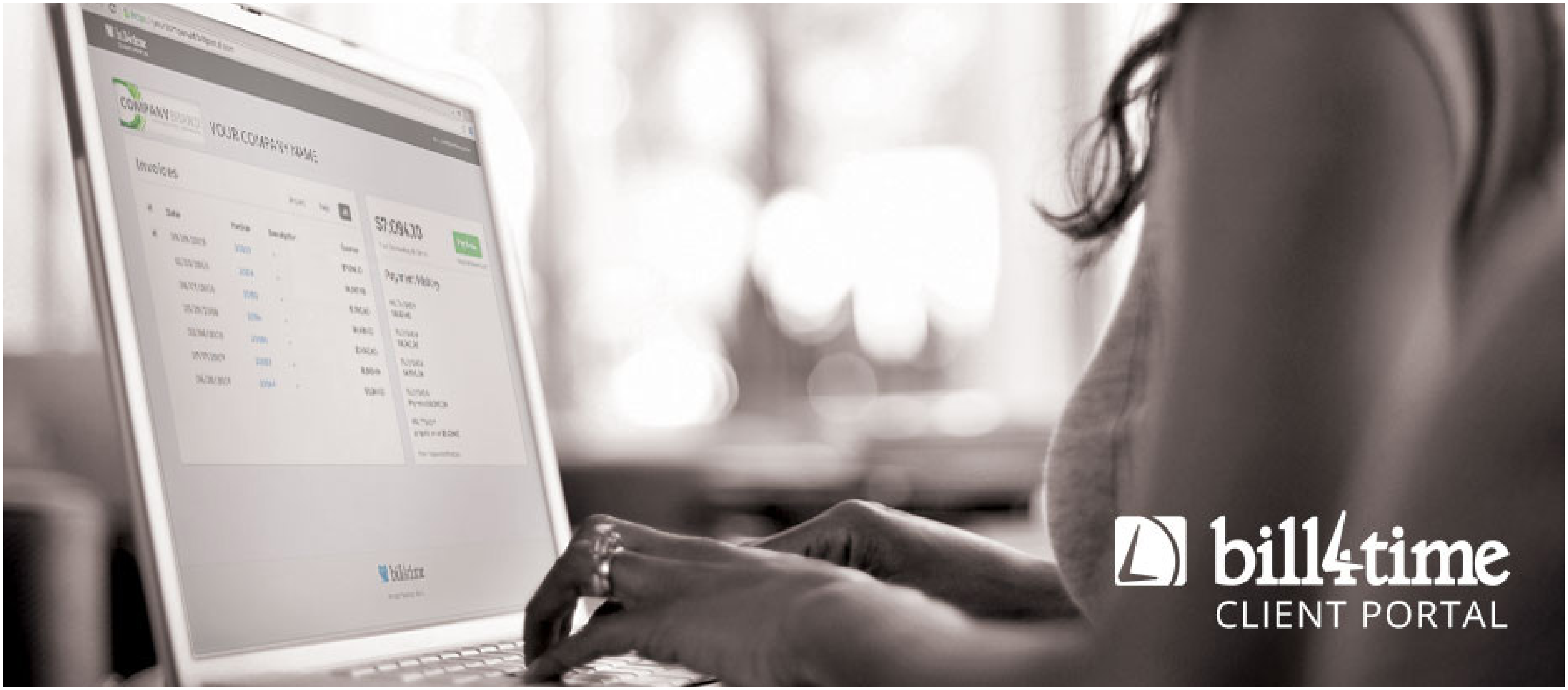



# QUICK START GUIDE

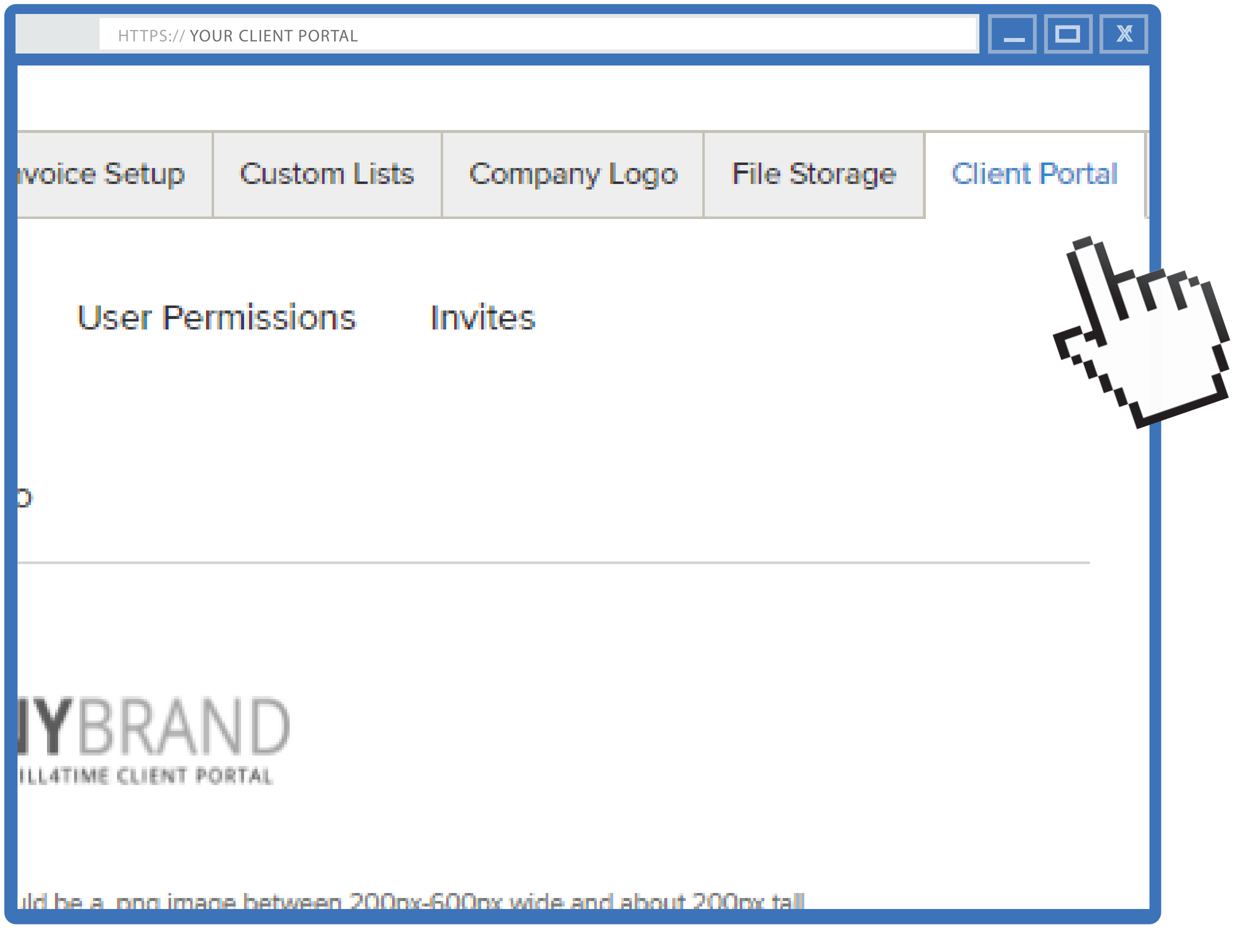
From start to finish, admin to user, we will quickly cover each topic in your new Client Payment Portal.

This should only take a few minutes, we promise.

May 2017 QSGV.150209.2

## Log Into to Your Client Portal

To access your Client Portal settings, click your name at the top right of any page and select Settings. From there, you will have access to your Client Portal tab. *Please note if you do not have access to Settings you will need to contact your System Admin to grant you these permissions.*




## Upload Your Logo

For best results, your logo should be a PNG image between 200px and 600px wide and about 200px tall.

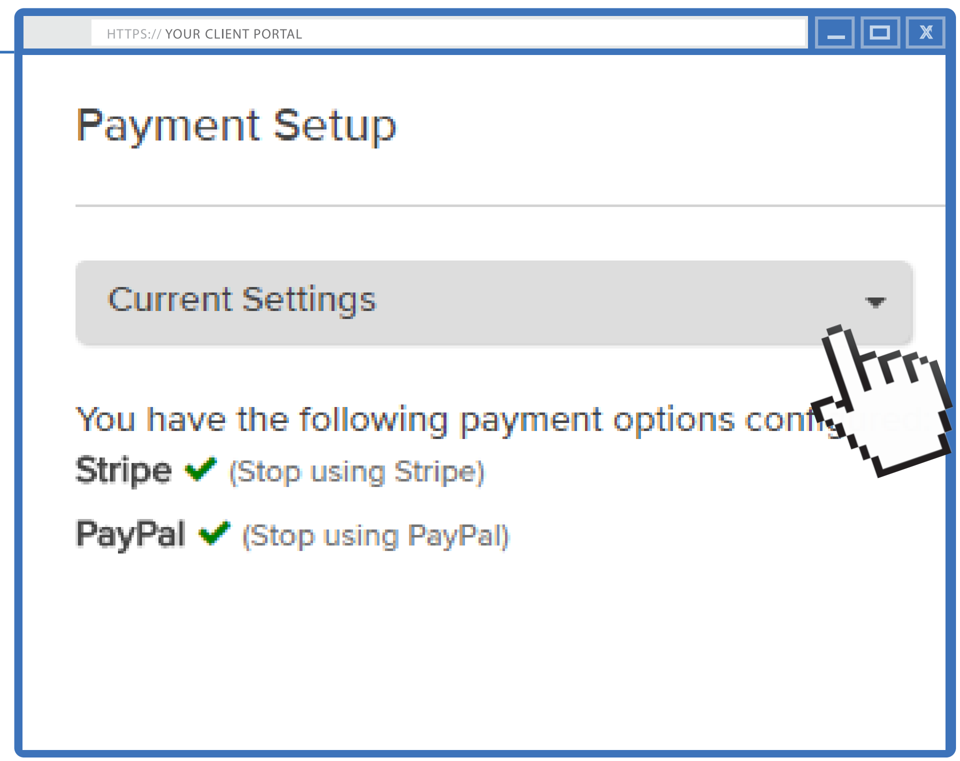
Pick a file, upload, and you're done!

## Let's Configure Your Payment Options

stripe

Stripe is the premier credit card processor that allows your clients to pay with ease. The option for your clients to setup and make payments through ACH is also available through Stripe.

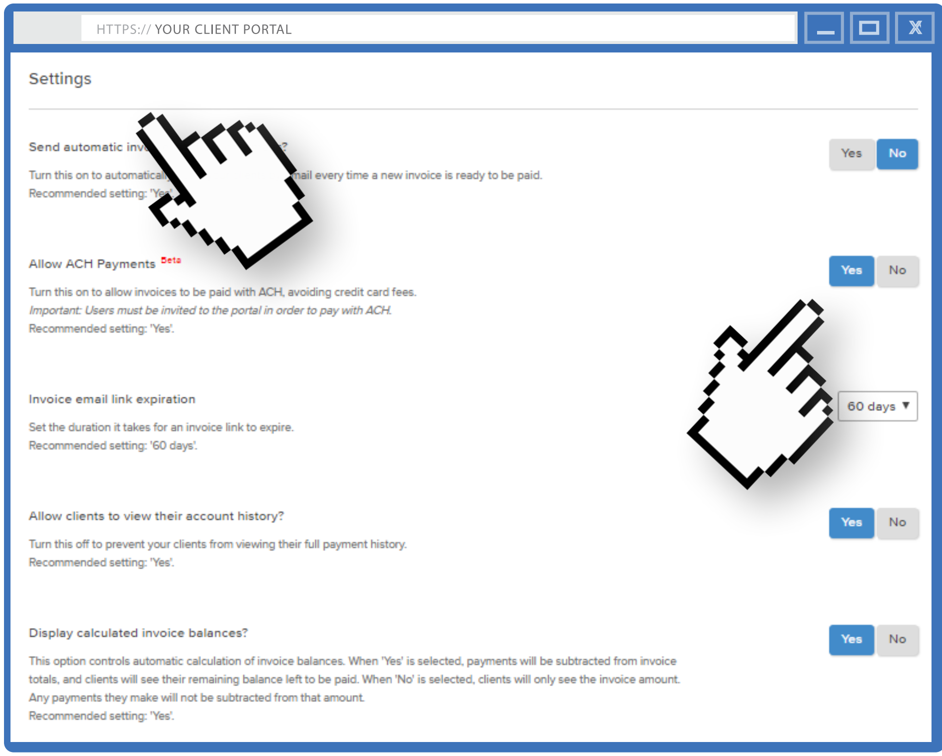
Not a stripe user? Just click the "Connect with Stripe" and you'll be setup within minutes. More info - [https://stripe.com/us/pricing](https://stripe.com/us/pricing)




PayPal

LawPay
CREDIT CARD PROCESSING

In addition to Stripe, you can also enable integrations with PayPal and Lawpay, or you can use a custom link that directs customers to your own payment portal.




## Client Settings

Before you start inviting your clients to use the Bill4Time Client Portal, please take a moment to review the following settings:

### ACCOUNTING SETTINGS

Allow your clients to view their history of invoices or keep it strictly to payments.

### EMAIL SETTINGS

When you create an invoice you can choose whether or not to automatically send an email notification to the client.

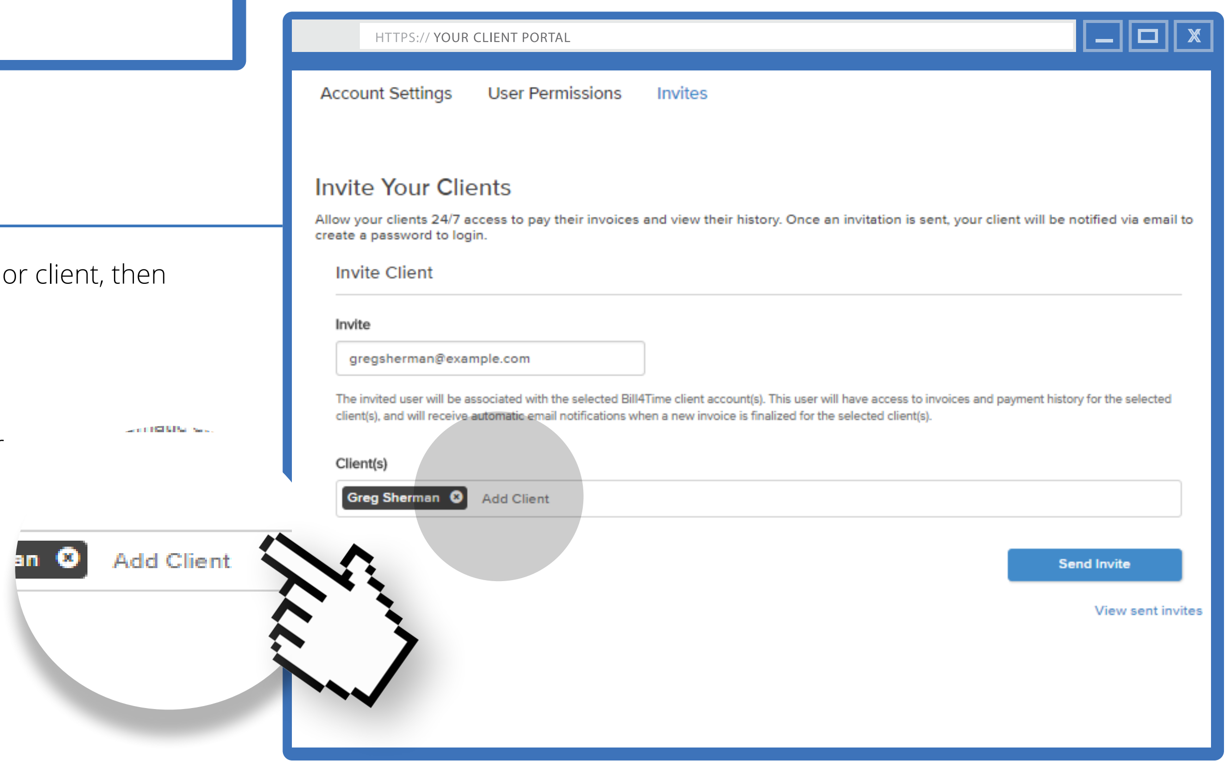
The button highlighted in **BLUE** is the current selection.

## Invite Your Clients

Enter their Email address, choose an associated company or client, then click Send Invite and you're done!

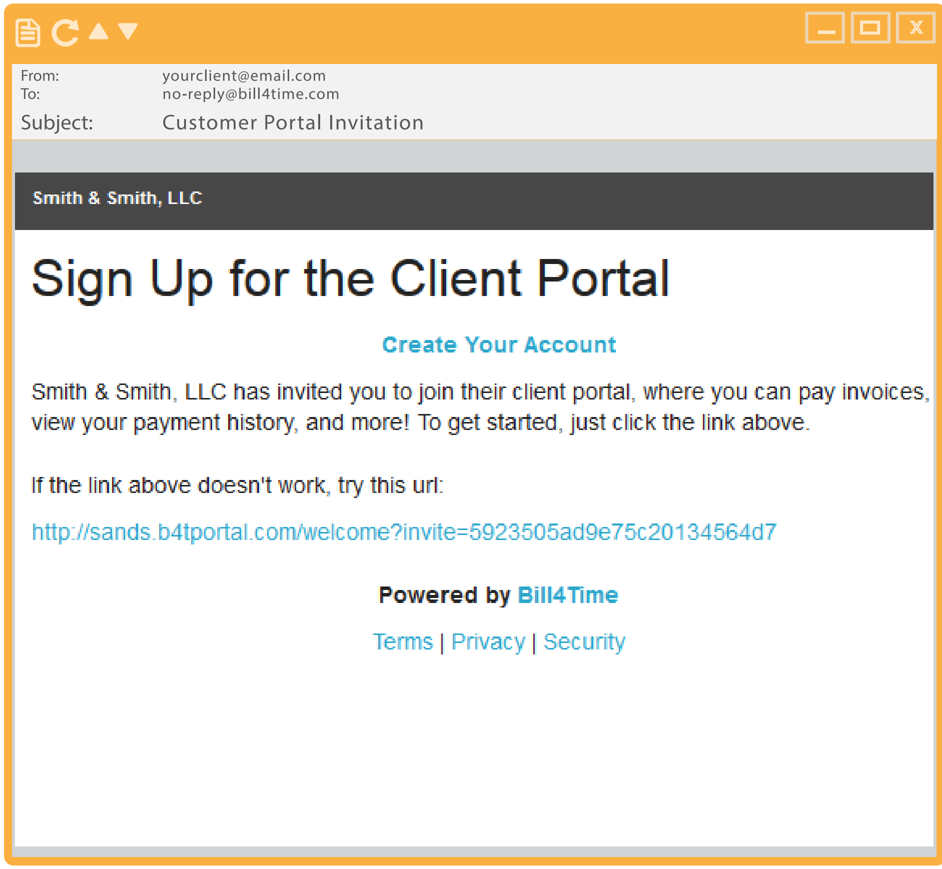
### SETTING USER PERMISSIONS

Most of your users will be associated with a single client or business entity. For your users who have more than one business or client, you can associate a single user with multiple entities. Just click Add Client, or you can remove access, to manage certain clients within a user's permission.




bill4time

Your Complete Time Billing Solution

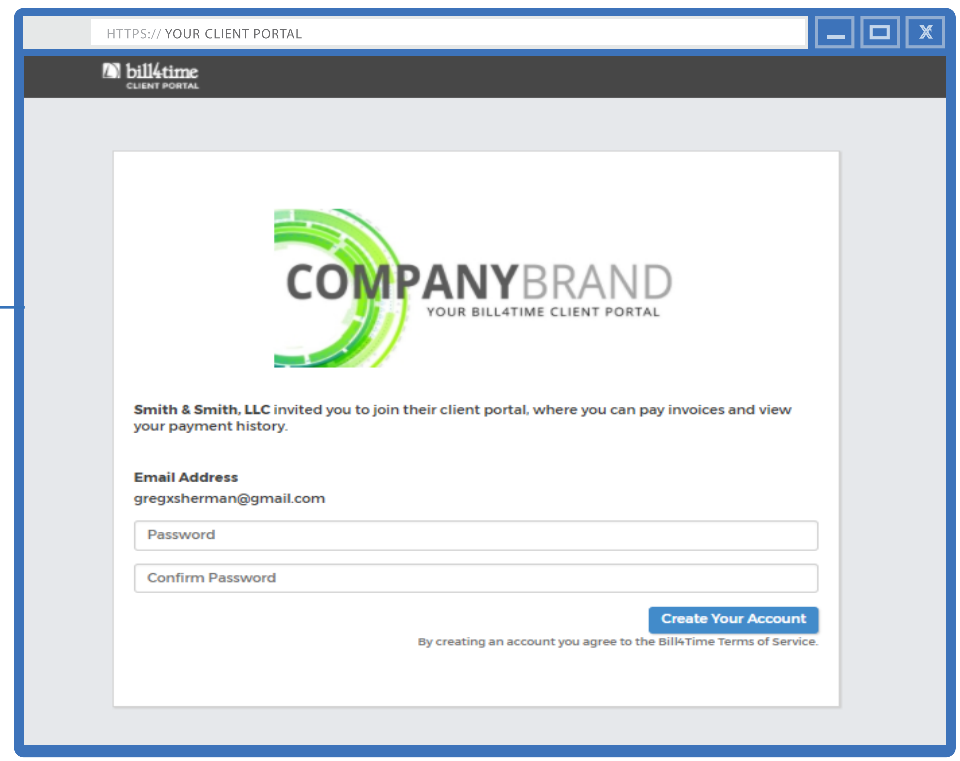



## Email Invitation

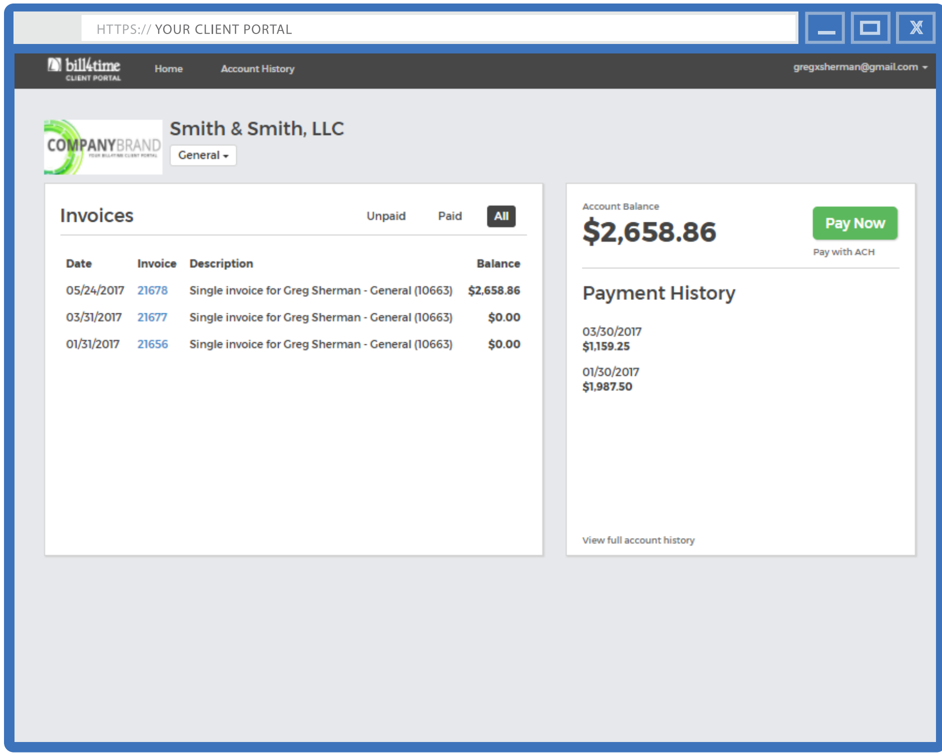
Your client will receive an email with a link to create an account. Once they click the link, they can create a password to securely sign into their portal to view and pay for their invoices with ease.

## Client Password

With one creative password and a click, your client creates an account and is ready to go!




bill4time
Your Complete Time Billing Solution



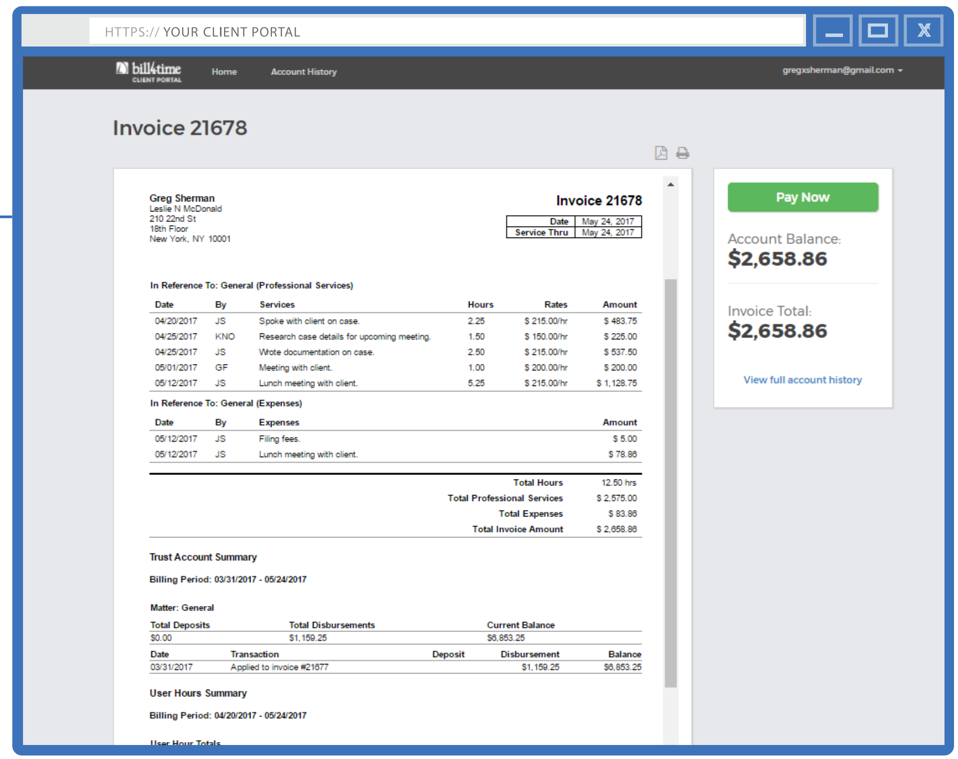

## Invoice Dashboard

After creating an account or successfully logging in, your client will land on the invoices dashboard.

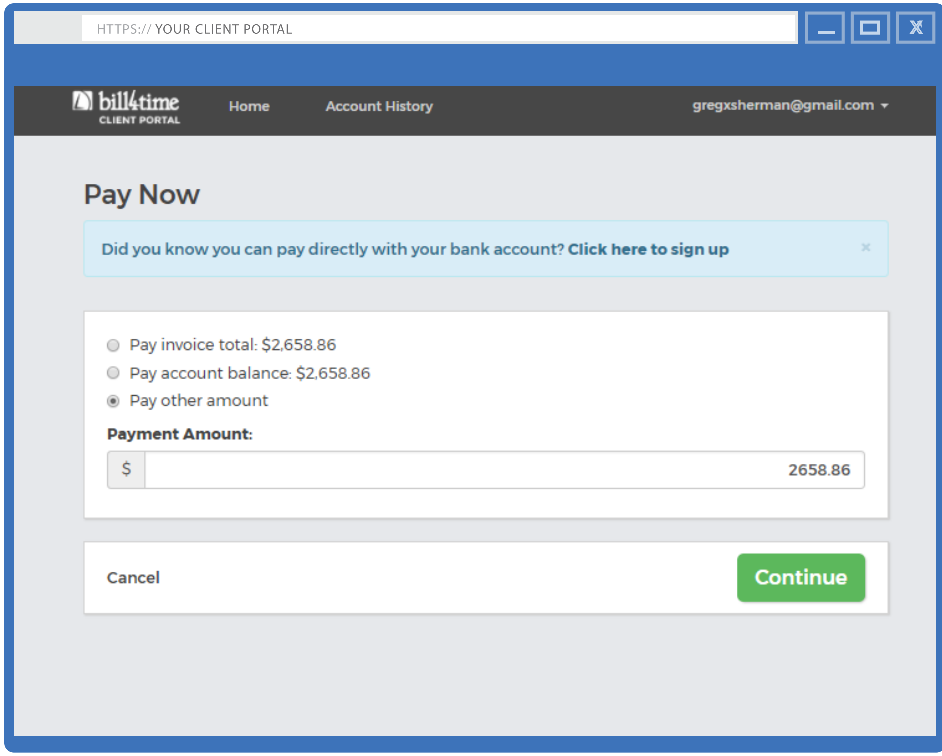
If you have not allowed access to see their history, only unpaid invoices will be shown. By default all unpaid invoices will be selected. For this example we have chosen to show all invoices.

## Invoice Preview

By clicking directly on the invoice number, your client can preview each invoice and easily "Pay Now" after review.




bill4time
Your Complete Time Billing Solution



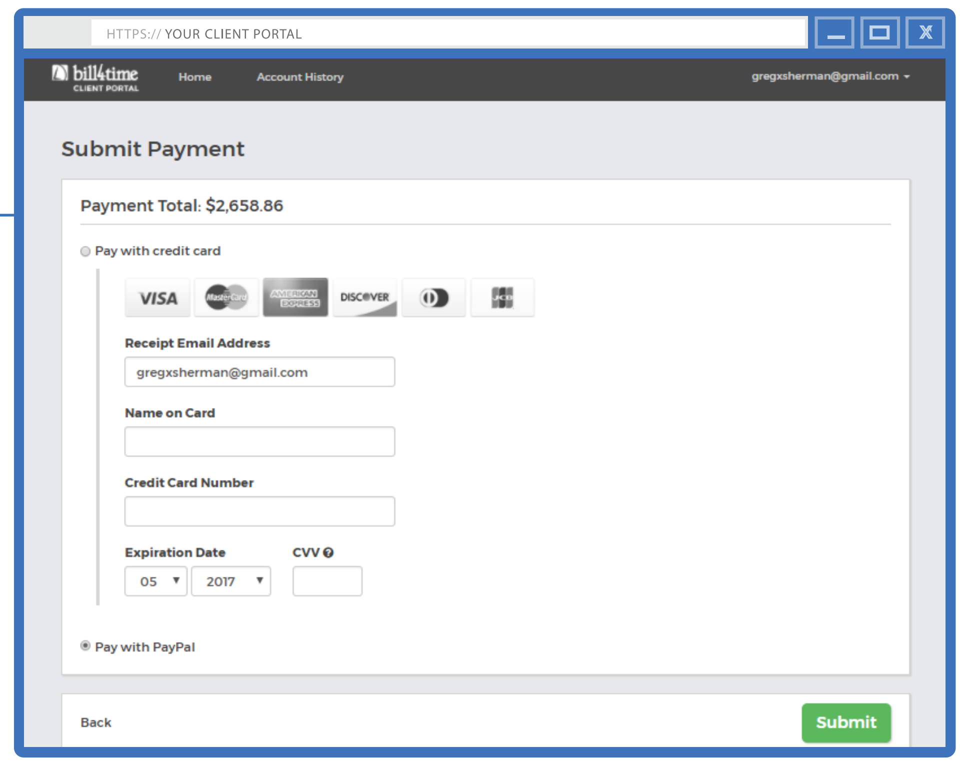

## Payment Confirmation

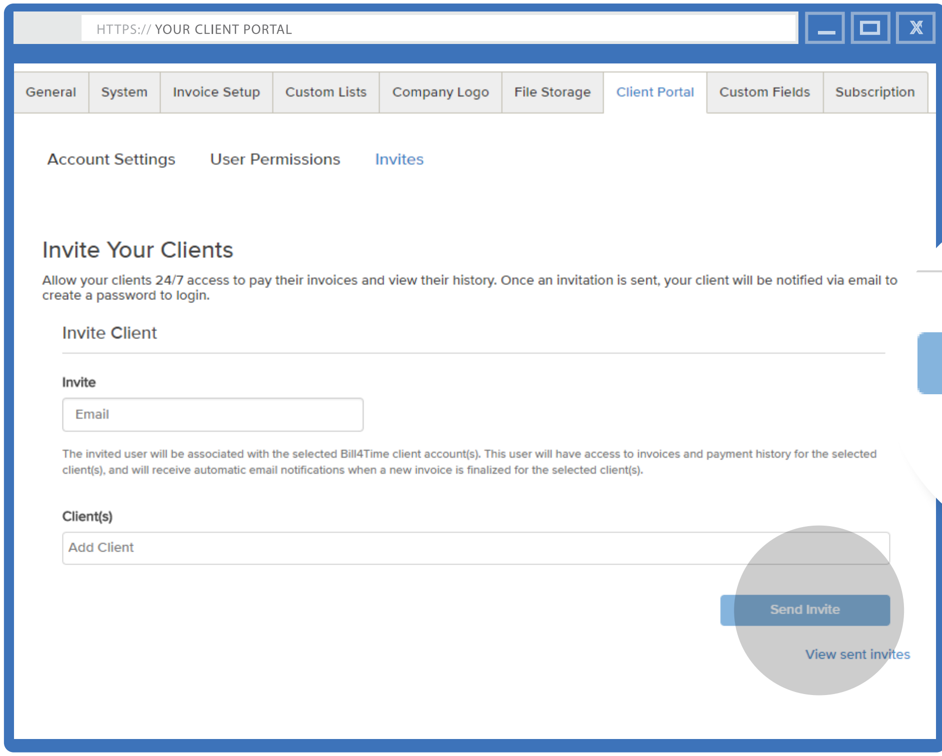
Once your client clicks to pay for an invoice it will show them the total of the invoice or total balance overall. They can also choose to pay a different amount to enter in manually. Once finished, they can continue to enter in their payment information.

## Submit Payment

If you provide both Stripe and PayPal payment options, both will be available for your client to select from. If one option (Stripe or PayPal) is provided, that will be the only option displayed.

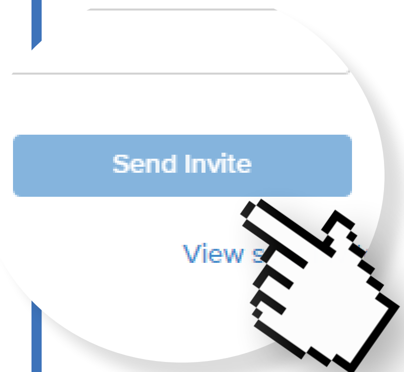
Once the payment is submitted, it will automatically deduct from your invoice totals in Bill4Time.






## View Sent Invites

Now see the status of your invitations in real-time. Below is a quick breakdown.

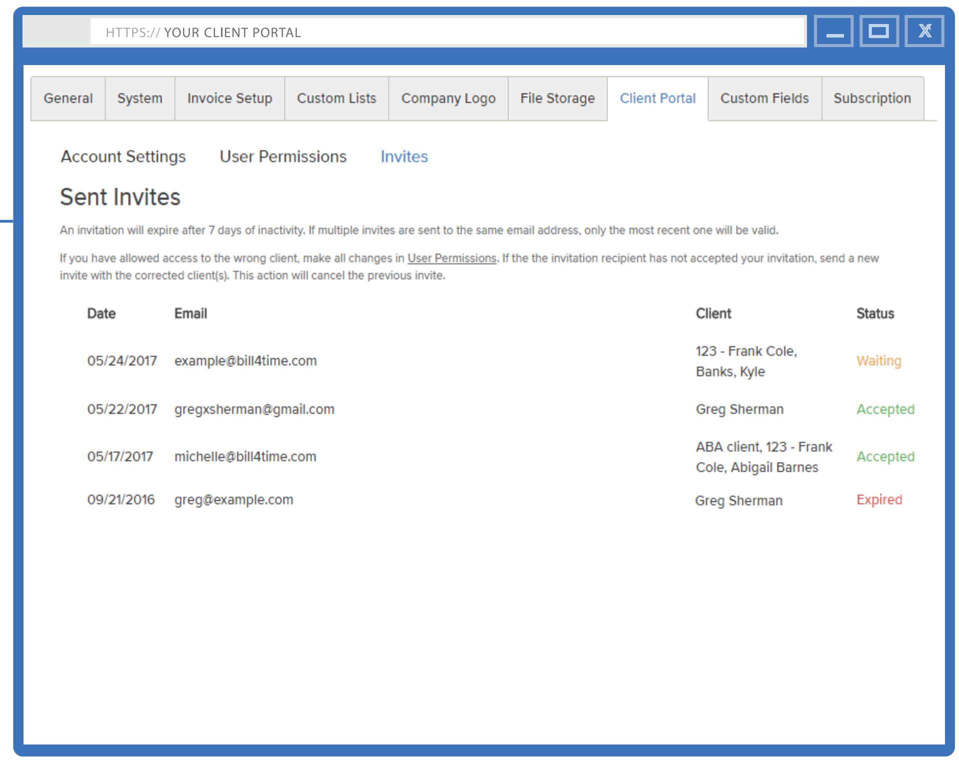



**DATE & EMAIL**

The date and email address the invitation was sent on and to.

**CLIENT**

The client(s) associated with the invited user. If you've allowed access to the wrong client, make all changes in User Permissions. If the invitation recipient has not accepted your invitation, send a new invite with the corrected client(s). This action will cancel the previous invite.




## Status

**ACCEPTED**

Your client has received your invitation and successfully created an account.

**WAITING**

Your client has received the email invitation but hasn't clicked through to create an account.

**EXPIRED**

The invitation due to 7 days of inactivity or if an additional invite was sent to the existing email address.

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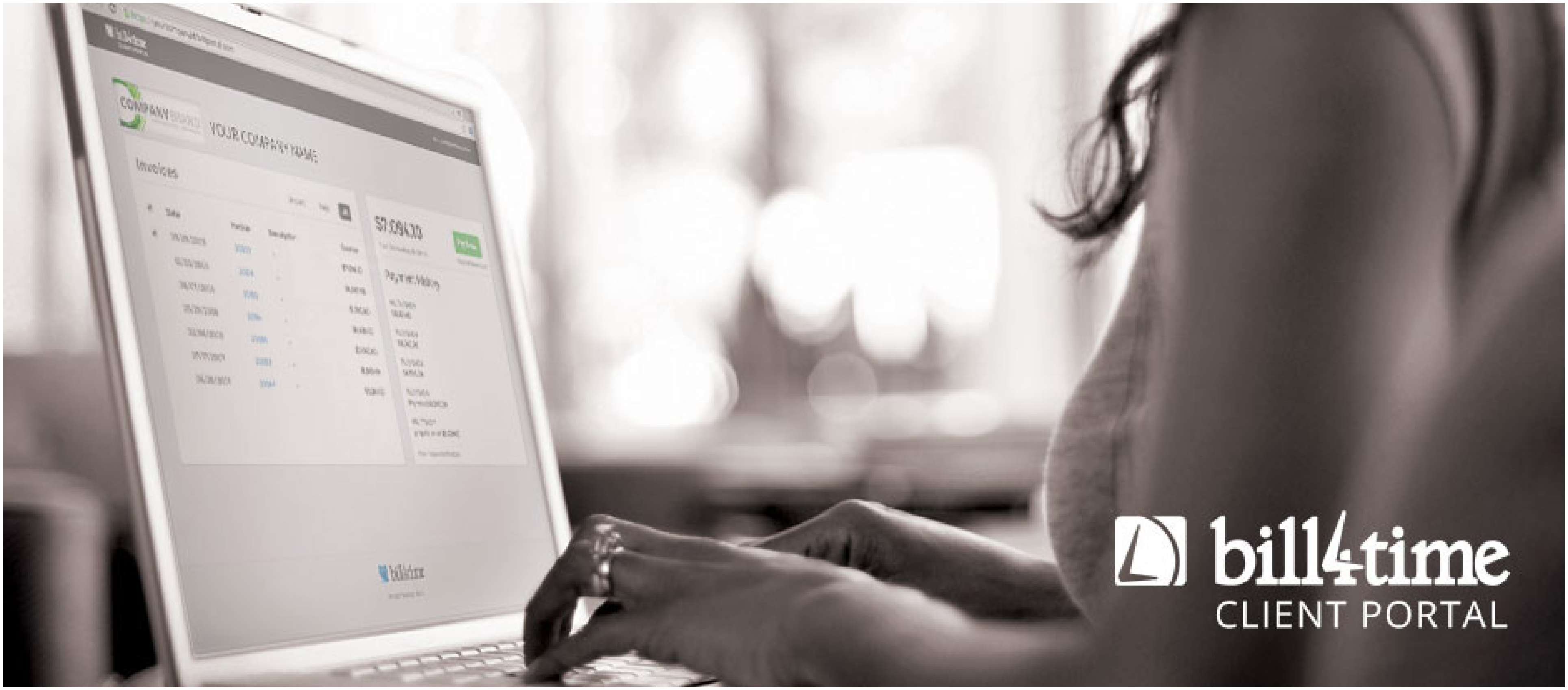


## That's it!

Now that you know your Client Portal inside and out,
start sending those invitations!

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